

Weighted
All Respondents - Banner 2

Grid_Q20B_Q20B. [The overall investment environment] As you look to the 2025 business environment, to what extent do you consider each of the following factors to be favourable for investors?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
Top 2 box (Net)	34	84	64	66	59	78	74	82	41	64	48
	69%	84%	64%	66%	59%	78%	74%	81%	82%	64%	48%
(5) Very favourable	13	42	23	22	24	23	33	42	14	28	5
	26%	42%	23%	22%	24%	23%	33%	41%	29%	28%	5%
(4) Somewhat favourable	22	42	41	44	35	55	41	40	26	36	43
	43%	42%	41%	44%	35%	55%	41%	40%	53%	36%	43%
(3) Neither favourable nor unfavourable	10	13	22	20	29	16	19	11	8	24	41
	21%	13%	22%	20%	29%	16%	19%	11%	15%	24%	41%
Bottom 2 box (Net)	5	3	14	14	12	6	7	8	2	12	11
	10%	3%	14%	14%	12%	6%	7%	8%	3%	13%	11%
(2) Somewhat unfavourable	5	2	8	14	10	4	7	5	2	10	9
	10%	2%	8%	14%	10%	4%	7%	5%	3%	10%	9%
(1) Very unfavourable	-	1	6	-	2	2	-	3	-	2	2
	-	1%	6%	-	2%	2%	-	3%	-	2%	2%
Summary											
Mean	3.85	4.22	3.67	3.74	3.69	3.93	4	4.12	4.08	3.77	3.4
Standard deviation	0.93	0.82	1.1	0.96	1.01	0.86	0.9	0.98	0.75	1.04	0.8
Sigma	50	100	100	100	100	100	100	100	50	100	100
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Grid_Q20B_Q20B. [The private markets environment (Includes capital availability, cost of capital, private market liquidity, M&A and deal activity, and private credit activity and availability)] As you look to the 2025 business environment, to what extent do you consider each of the following factors to be favourable for investors?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
Top 2 box (Net)	36	83	72	75	70	81	79	90	41	67	37
	73%	83%	72%	75%	70%	81%	79%	89%	82%	67%	37%
(5) Very favourable	14	40	20	25	24	28	38	44	15	32	4
	28%	40%	20%	25%	24%	28%	38%	44%	30%	32%	4%
(4) Somewhat favourable	22	43	52	50	46	53	41	46	26	35	33
	45%	43%	52%	50%	46%	53%	41%	45%	52%	35%	33%
(3) Neither favourable nor unfavourable	12	13	20	14	19	14	17	9	8	26	49
	23%	13%	20%	14%	19%	14%	17%	9%	15%	26%	49%
Bottom 2 box (Net)	2	4	8	11	11	5	4	1	2	7	14
	4%	4%	8%	11%	11%	5%	4%	1%	3%	7%	14%
(2) Somewhat unfavourable	1	3	7	10	9	5	2	1	2	7	12
	2%	3%	7%	10%	9%	5%	2%	1%	3%	7%	12%
(1) Very unfavourable	1	1	1	1	2	-	2	-	-	-	2
	2%	1%	1%	1%	2%	-	2%	-	-	-	2%
Summary											
Mean	3.95	4.18	3.83	3.88	3.81	4.04	4.11	4.32	4.09	3.92	3.25
Standard deviation	0.88	0.85	0.87	0.94	0.97	0.79	0.9	0.7	0.76	0.93	0.8
Sigma	50	100	100	100	100	100	100	100	50	100	100
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

- Column Proportions:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

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Grid_Q20B_Q20B. [The geopolitical environment (Includes strategic competition between nations, trade relations, energy security considerations, international cooperation, international tensions, and outright conflict)] As you look to the 2025 business environment, to what extent do you consider each of the following factors to be favourable for investors?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
Top 2 box (Net)	35	72	62	65	55	74	72	88	41	64	32
	70%	72%	62%	65%	55%	74%	72%	87%	82%	65%	32%
(5) Very favourable	11	29	26	30	30	32	34	55	15	28	4
	22%	29%	26%	30%	30%	32%	34%	55%	30%	28%	4%
(4) Somewhat favourable	24	43	36	35	25	42	38	33	26	36	28
	48%	43%	36%	35%	25%	42%	38%	33%	52%	36%	28%
(3) Neither favourable nor unfavourable	6	16	19	18	25	16	16	10	6	17	37
	13%	16%	19%	18%	25%	16%	16%	10%	13%	17%	37%
Bottom 2 box (Net)	8	12	19	17	20	10	12	3	2	19	31
	17%	12%	19%	17%	20%	10%	12%	3%	5%	19%	31%
(2) Somewhat unfavourable	6	9	15	13	17	9	10	3	2	15	24
	13%	9%	15%	13%	17%	9%	10%	3%	5%	15%	24%
(1) Very unfavourable	2	3	4	4	3	1	2	-	-	3	7
	4%	3%	4%	4%	3%	1%	2%	-	-	3%	7%
Summary											
Mean	3.71	3.86	3.65	3.74	3.62	3.95	3.92	4.39	4.07	3.71	2.98
Standard deviation	1.08	1.03	1.14	1.14	1.17	0.97	1.04	0.78	0.8	1.14	0.98
Sigma	50	100	100	100	100	100	100	100	50	100	100
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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All Respondents - Banner 2

Grid_Q20B_Q20B. [Macroeconomic factors (Includes monetary policy and interest rates, inflation, economic growth, international trade, and the business cycle)] As you look to the 2025 business environment, to what extent do you consider each of the following factors to be favourable for investors?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
Top 2 box (Net)	38	76	64	69	67	71	71	84	40	68	48
	75%	76%	64%	69%	67%	71%	71%	84%	81%	68%	48%
(5) Very favourable	15	36	23	24	18	21	26	46	14	27	6
	30%	36%	23%	24%	18%	21%	26%	45%	29%	27%	6%
(4) Somewhat favourable	22	40	41	45	49	50	45	39	26	41	42
	45%	40%	41%	45%	49%	50%	45%	39%	52%	42%	42%
(3) Neither favourable nor unfavourable	6	15	26	20	22	21	23	14	9	18	39
	13%	15%	26%	20%	22%	21%	23%	14%	18%	18%	39%
Bottom 2 box (Net)	6	9	10	11	11	8	6	2	*	13	13
	12%	9%	10%	11%	11%	8%	6%	2%	1%	14%	13%
(2) Somewhat unfavourable	6	7	9	10	9	7	5	1	*	11	9
	11%	7%	9%	10%	9%	7%	5%	1%	1%	11%	9%
(1) Very unfavourable	*	2	1	1	2	1	1	1	-	2	4
	1%	2%	1%	1%	2%	1%	1%	1%	-	2%	4%
Summary											
Mean	3.92	4.01	3.76	3.81	3.72	3.83	3.9	4.27	4.09	3.79	3.37
Standard deviation	0.99	0.99	0.94	0.95	0.93	0.88	0.88	0.8	0.72	1.04	0.88
Sigma	50	100	100	100	100	100	100	100	50	100	100
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)
- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Grid_Q20B_Q20B. [The regulatory environment (Includes the tax regime, investment incentives, and the rules and regulations that businesses must follow)] As you look to the 2025 business environment, to what extent do you consider each of the following factors to be favourable for investors?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
Top 2 box (Net)	34	79	68	62	62	77	73	87	42	61	39
	68%	79%	68%	62%	62%	77%	73%	87%	84%	61%	39%
(5) Very favourable	13	34	16	28	24	30	29	50	14	26	4
	26%	34%	16%	28%	24%	30%	29%	50%	27%	26%	4%
(4) Somewhat favourable	21	45	52	34	38	47	44	37	28	35	35
	42%	45%	52%	34%	38%	47%	44%	37%	57%	35%	35%
(3) Neither favourable nor unfavourable	12	9	21	28	21	14	15	11	8	17	48
	25%	9%	21%	28%	21%	14%	15%	11%	15%	17%	48%
Bottom 2 box (Net)	4	12	11	10	17	9	12	2	*	22	13
	7%	12%	11%	10%	17%	9%	12%	2%	1%	22%	13%
(2) Somewhat unfavourable	2	11	9	10	17	7	11	2	*	17	10
	5%	11%	9%	10%	17%	7%	11%	2%	1%	17%	10%
(1) Very unfavourable	1	1	2	-	-	2	1	-	-	5	3
	2%	1%	2%	-	-	2%	1%	-	-	5%	3%
Summary											
Mean	3.85	4	3.71	3.8	3.69	3.96	3.89	4.35	4.1	3.61	3.27
Standard deviation	0.94	0.98	0.91	0.96	1.02	0.95	0.98	0.76	0.68	1.18	0.81
Sigma	50	100	100	100	100	100	100	100	50	100	100
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

- Column Proportions:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

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All Respondents - Banner 2

Grid_Q20B_Q20B. [The pace of technological change (Includes ability to capitalize on technological change, pressure to adopt new technologies, workforce impacts, cybersecurity and data security concerns)] As you look to the 2025 business environment, to what extent do you consider each of the following factors to be favourable for investors?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
Top 2 box (Net)	40	87	71	76	81	76	82	91	42	82	49
	79%	87%	71%	76%	81%	76%	82%	91%	84%	82%	49%
(5) Very favourable	16	50	26	34	32	26	42	54	14	30	6
	33%	50%	26%	34%	32%	26%	42%	53%	27%	30%	6%
(4) Somewhat favourable	23	37	45	42	49	50	40	38	28	52	43
	46%	37%	45%	42%	49%	50%	40%	37%	57%	52%	43%
(3) Neither favourable nor unfavourable	8	12	21	18	11	19	13	9	7	15	43
	17%	12%	21%	18%	11%	19%	13%	9%	14%	15%	43%
Bottom 2 box (Net)	2	1	8	6	8	5	5	1	1	3	8
	4%	1%	8%	6%	8%	5%	5%	1%	2%	3%	8%
(2) Somewhat unfavourable	2	1	4	6	8	3	4	1	1	3	6
	4%	1%	4%	6%	8%	3%	4%	1%	2%	3%	6%
(1) Very unfavourable	-	-	4	-	-	2	1	-	-	*	2
	-	-	4%	-	-	2%	1%	-	-	0%	2%
Summary											
Mean	4.08	4.36	3.85	4.04	4.05	3.95	4.18	4.43	4.09	4.09	3.45
Standard deviation	0.82	0.73	0.99	0.88	0.87	0.87	0.88	0.68	0.7	0.77	0.78
Sigma	50	100	100	100	100	100	100	100	50	100	100
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

- Column Proportions:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

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All Respondents - Banner 2
Grid_Q20B_Q20B. [Top 2 Box] As you look to the 2025 business environment, to what extent do you consider each of the following factors to be favourable for investors?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
The overall investment environment	34	84	64	66	59	78	74	82	41	64	48
	69%	84%	64%	66%	59%	78%	74%	81%	82%	64%	48%
The private markets environment (Includes capital availability, cost of capital, private market liquidity, M&A and deal activity, and private credit activity and availability)	36	83	72	75	70	81	79	90	41	67	37
	73%	83%	72%	75%	70%	81%	79%	89%	82%	67%	37%
The geopolitical environment (Includes strategic competition between nations, trade relations, energy security considerations, international cooperation, international tensions, and outright conflict)	35	72	62	65	55	74	72	88	41	64	32
	70%	72%	62%	65%	55%	74%	72%	87%	82%	65%	32%
Macroeconomic factors (Includes monetary policy and interest rates, inflation, economic growth, international trade, and the business cycle)	38	76	64	69	67	71	71	84	40	68	48
	75%	76%	64%	69%	67%	71%	71%	84%	81%	68%	48%
The regulatory environment (Includes the tax regime, investment incentives, and the rules and regulations that businesses must follow)	34	79	68	62	62	77	73	87	42	61	39
	68%	79%	68%	62%	62%	77%	73%	87%	84%	61%	39%
The pace of technological change (Includes ability to capitalize on technological change, pressure to adopt new technologies, workforce impacts, cybersecurity and data security concerns)	40	87	71	76	81	76	82	91	42	82	49
	79%	87%	71%	76%	81%	76%	82%	91%	84%	82%	49%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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All Respondents - Banner 2

GRID_Q18_scale. [Macroeconomic factors (including inflation, interest rates)] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	12	21	17	13	12	13	22	7	8	20	15
	24%	21%	17%	13%	12%	13%	22%	7%	17%	20%	15%
	D						b				
2nd most important	6	17	23	22	22	14	14	14	7	21	19
	12%	17%	23%	22%	22%	14%	14%	14%	14%	21%	19%
			L							n	p
3rd most important	8	15	16	19	13	11	11	15	8	13	18
	16%	15%	16%	19%	13%	11%	11%	15%	15%	13%	18%
Sigma	26	53	56	54	47	38	47	36	23	54	52
	52%	53%	56%	54%	47%	38%	47%	36%	46%	54%	52%

- Column Proportions:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

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All Respondents - Banner 2

GRID_Q18_scale. [Financial market volatility] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	11	18	25	19	14	13	20	29	6	22	11
	22%	18%	25%	19%	14%	13%	20%	29%	13%	22%	11%
								f			
2nd most important	10	13	21	17	14	13	23	18	7	26	18
	21%	13%	21%	17%	14%	13%	23%	18%	14%	26%	18%
3rd most important	8	24	19	19	18	13	14	16	6	19	12
	15%	24%	19%	19%	18%	13%	14%	16%	12%	19%	12%
	D										
Sigma	29	55	65	55	46	39	57	64	20	67	41
	58%	55%	65%	55%	46%	39%	57%	63%	39%	67%	41%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2

GRID_Q18_scale. [Geopolitical instability] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	6	10	16	22	30	20	11	14	6	13	15
	13%	10%	16%	22%	30%	20%	11%	14%	12%	13%	15%
			L	P	T	X					
2nd most important	8	25	13	16	4	11	15	11	7	12	10
	15%	25%	13%	16%	4%	11%	15%	11%	14%	12%	10%
		H	L								
3rd most important	8	19	20	7	11	17	15	11	7	16	13
	15%	19%	20%	7%	11%	17%	15%	11%	14%	16%	13%
		H									
Sigma	22	54	49	45	45	48	41	36	20	40	38
	43%	54%	49%	45%	45%	48%	41%	36%	40%	40%	38%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2
GRID_Q18_scale. [Access to capital] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	-	-	-	-	-	-	-	-	-	-	-
Base: Total answering	-	-	-	-	-	-	-	-	-	-	-
1st most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
2nd most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
3rd most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Sigma	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2
GRID_Q18_scale. [Leadership/governance] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	-	-	-	-	-	-	-	-	-	-	-
Base: Total answering	-	-	-	-	-	-	-	-	-	-	-
1st most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
2nd most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
3rd most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Sigma	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2
GRID_Q18_scale. [Trust/transparency] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	-	-	-	-	-	-	-	-	-	-	-
Base: Total answering	-	-	-	-	-	-	-	-	-	-	-
1st most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
2nd most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
3rd most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Sigma	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2
GRID_Q18_scale. [Addressing climate/sustainability] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	2	6	8	8	11	9	13	12	6	6	6
	4%	6%	8%	8%	11%	9%	13%	12%	12%	6%	6%
2nd most important	4	11	9	8	12	11	14	10	6	6	12
	7%	11%	9%	8%	12%	11%	14%	10%	12%	6%	12%
3rd most important	4	11	11	12	13	12	11	10	6	8	9
	8%	11%	11%	12%	13%	12%	11%	10%	11%	8%	9%
Sigma	10	28	28	28	36	32	38	32	18	21	27
	19%	28%	28%	28%	36%	32%	38%	32%	35%	21%	27%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2
GRID_Q18_scale. [Adapting talent and skills] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	5	12	10	16	9	7	5	11	8	7	22
	10%	12%	10%	16%	9%	7%	5%	11%	15%	7%	22%
2nd most important	6	7	11	10	12	8	10	11	5	12	9
	11%	7%	11%	10%	12%	8%	10%	11%	10%	12%	9%
3rd most important	2	10	6	10	13	15	13	10	5	8	11
	5%	10%	6%	10%	13%	15%	13%	10%	10%	8%	11%
Sigma	13	29	27	36	34	30	28	32	18	27	42
	26%	29%	27%	36%	34%	30%	28%	32%	35%	27%	42%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2
GRID_Q18_scale. [The rise of AI] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	-	-	-	-	-	-	-	-	-	-	-
Base: Total answering	-	-	-	-	-	-	-	-	-	-	-
1st most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
2nd most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
3rd most important	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Sigma	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted

All Respondents - Banner 2

GRID_Q18_scale. [Liquidity constraints] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	6	9	9	6	3	12	9	5	5	9	10
	12%	9%	9%	6%	3%	12%	9%	5%	10%	9%	10%
2nd most important	6	8	11	9	11	9	3	9	6	5	10
	13%	8%	11%	9%	11%	9%	3%	9%	12%	5%	10%
3rd most important	5	4	8	13	10	7	13	9	8	11	10
	10%	4%	8%	13%	10%	7%	13%	9%	16%	11%	10%
Sigma	18	21	28	28	24	28	25	23	19	25	30
	35%	21%	28%	28%	24%	28%	25%	23%	38%	25%	30%

- Column Proportions:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted

All Respondents - Banner 2

GRID_Q18_scale. [Managing diverse stakeholder expectations] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	4	11	10	6	7	13	5	9	3	7	10
	9%	11%	10%	6%	7%	13%	5%	9%	6%	7%	10%
2nd most important	5	9	5	8	11	9	13	11	6	8	10
	10%	9%	5%	8%	11%	9%	13%	11%	12%	8%	10%
3rd most important	7	5	7	7	9	10	9	16	5	10	9
	14%	5%	7%	7%	9%	10%	9%	16%	10%	11%	9%
Sigma	16	25	22	21	27	32	27	37	14	25	29
	33%	25%	22%	21%	27%	32%	27%	37%	28%	25%	29%

- Column Proportions:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q

Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted

All Respondents - Banner 2

GRID_Q18_scale. [Integrating evolving technologies including AI] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	3	13	5	10	12	13	15	11	7	14	11
	6%	13%	5%	10%	12%	13%	15%	11%	14%	14%	11%
2nd most important	6	10	7	10	14	22	8	16	6	11	10
	11%	10%	7%	10%	14%	22%	8%	16%	12%	11%	10%
3rd most important	8	11	12	12	13	8	14	13	6	12	17
	15%	11%	12%	12%	13%	8%	14%	13%	12%	12%	17%
Sigma	16	34	24	32	39	43	37	41	19	36	38
	32%	34%	24%	32%	39%	43%	37%	41%	38%	37%	38%

- Column Proportions:
- Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
- Minimum Base: 30 (**), Small Base: 100 (*)
- Column Means:
- Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
- Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2
GRID_Q18_scale. [Other] What is the largest challenge facing you as an investor today?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
1st most important	-	-	-	-	2	-	-	-	*	2	-
	-	-	-	-	2%	-	-	-	1%	2%	-
2nd most important	-	-	-	-	-	3	-	-	-	-	2
	-	-	-	-	-	3%	-	-	-	-	2%
3rd most important	1	1	1	1	-	7	-	-	-	2	1
	2%	1%	1%	1%	-	7%	-	-	-	2%	1%
						X					
Sigma	1	1	1	1	2	10	-	-	*	4	3
	2%	1%	1%	1%	2%	10%	-	-	1%	4%	3%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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Weighted
All Respondents - Banner 2

Q24. Where are you most focused on embedding AI capabilities into your business?

	Australia	Brazil	Canada	Hong Kong	France	Germany	Great Britain	India	Singapore	US	Japan
	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4	W4
	E	I	M	Q	U	Y	c	g	k	o	q
Unweighted Base	100	100	100	100	100	100	100	150	100	150	100
Base: Total answering	50	100	100	100	100	100	100	100	50	100	100
Informing and enhancing investment decisions (including due diligence, portfolio rebalancing, etc)	8	22	31	29	36	23	29	34	13	29	17
	17%	22%	31%	29%	36%	23%	29%	34%	26%	30%	17%
Better leveraging and analyzing proprietary data (for value creation)	15	19	24	26	28	32	29	30	16	24	7
	30%	19%	24%	26%	28%	32%	29%	30%	31%	24%	7%
Enhancing productivity	13	35	23	27	17	17	22	23	10	24	23
	26%	35%	23%	27%	17%	17%	22%	23%	19%	24%	23%
Anticipating and mitigating investment risks	8	23	12	15	17	25	20	13	12	16	28
	16%	23%	12%	15%	17%	25%	20%	13%	23%	16%	28%
I'm not planning to invest in AI	6	1	10	3	2	3	-	-	*	6	25
	11%	1%	10%	3%	2%	3%	-	-	1%	6%	25%
Sigma	50	100	100	100	100	100	100	100	50	100	100
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

- Column Proportions:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)
- Column Means:
Columns Tested (5%): A, B/C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U, V/W/X/Y, Z/a/b/c, d/e/f/g, h/i/j/k, l/m/n/o, p/q
Minimum Base: 30 (**), Small Base: 100 (*)

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